

### **REMARKS/ARGUMENTS**

These remarks are made in response to the Office Action of April 23, 2007 (Office Action). As this response is timely filed within the 3-month shortened statutory period, no fee is believed due. However, the Examiner is expressly authorized to charge any deficiencies to Deposit Account No. 50-0951.

### **Claims Rejections – 35 USC § 103**

Claims 1-30 were rejected under 35 U.S.C. § 103(a) as being unpatentable over U.S. Patent 6,724,887 to Eilbacher, *et al.* (hereinafter Eilbacher), in view of U.S. Patent 6,798,876 to Bala (hereinafter Bala).

Although Applicants respectfully disagree with the rejections, Applicants have amended the claims to further emphasize certain aspects of the invention and to expedite prosecution of the present application. However, such amendments should not be interpreted as the surrender of any subject matter and Applicants reserve the right to present the original version of any of the amended claims in any future divisional or continuation applications from the present application.

As discussed herein, the claim amendments are fully supported throughout the Specification. No new matter has been introduced by the claim amendments.

### **Aspects of Applicants Invention**

It may be helpful to reiterate certain aspects of Applicants' invention prior to addressing the cited references. One embodiment of the invention, as typified by amended Claim 1, is a method for managing customer relationship management (CRM) resources.

The method can include communicatively linking a service router to a plurality of service resources; and or each of the service resources, establishing at least one routing criterion. (See, e.g., Specification, Fig. 1.) The method also can include receiving a plurality of service requests via a plurality of communication channels; analyzing the service requests for request characteristics; comparing the request characteristics to routing criteria; and automatically routing each of said service requests to a selected service resource based at least in part upon the comparing step. (See, e.g., Specification, Fig. 5.)

The method further can include obtaining a feedback from a feedback warehouse. The feedback warehouse can contain information about previous interactions from a variety of sources including scanned documents, surveys, data mining results, external automated feedback, and/or internal automated feedback mechanisms, and dynamically altering values for said routing criteria based upon the feedback. (See, e.g., Specification, Fig. 3.)

#### *The Claims Define Over The Prior Art*

In the present invention, the information stored in a customer service representative (CSR) profile is typically set up by determining a CSR's skills base and creating a CSR profile. The determining of the CSR's skills base can be subjective or can have a test associated with it to determine a particular skill (typing exam determining words per minute, Internet exam determining skills with chat, e-Mail, Co-Browsing or VoIP capabilities, exams regarding specific products). The profile information along with routing rules such as CSR availability information or physical location determine the intelligent routing that needs to be performed to ensure that the appropriate CSR receives a work item to handle a particular customer call/interaction. Most CSR profiles are typically set up when a new CSR joins the call center and are typically updated by the

CSR (or CSR manager) once a year. The update and maintenance of this information becomes critical for the appropriate intelligent routing of requests through the system.

The present invention creates a system that enhances existing CSR profile information by utilizing a data warehouse. The data warehouse contains information provided by multiple mechanisms that are available for customer interaction. The present invention provides a system that can determine the success that a CSR has with customers utilizing any or all interaction mechanisms. For example, the system can recognize if a customer purchases a product or is satisfied with services provided by the CSR by having the system recognize and correlate a customer's purchase or satisfaction with phone calls, e-mails, chat, or VoIP interactions.

A direct user feedback mechanism can also be created to have the customer provide information on their interaction experience with a CSR. The present invention enables traditional customer interaction mechanisms (e.g., mail or fax) to also be taken into account when examining CSR effectiveness. Existing systems recognize whether a phone conversation is not being handled appropriately by a CSR and enable a manager to become aware of the situation. The system of the present invention, by contrast, can provide the ability to have the system recognize any of the interaction mechanisms with the appropriate management notification along with an automated updating of profile information to intelligently maintain the system. The advantages of correlating customer interactions (e.g., purchases/satisfaction) and CSR interaction mechanisms in an automated fashion are numerous.

As recited in each of the independent claims, the present invention creates a feedback mechanism based on a "feedback warehouse". The information in the warehouse includes information about previous interactions from a variety of sources. The sources provide updates for the warehouse include scanned documents, surveys, data mining results, external automated feedback and/or internal automated feedback

mechanisms. The warehouse information is used in an automated fashion to facilitate intelligent routing. A feedback warehouse is created so that various criteria are stored and can easily expand to include new criteria in the future. A tool (see Specification, Fig. 4) is also included for monitoring and modification of service resources and their efficiency rates.

Eilbacher does not include feedback warehouse information in the routing that is performed. Bala describes a "post-call routine to determine how successfully it matched the customer with the appropriate call center representative." (Bala, Abstract.) However, Bala does not describe a pre-call routine utilizing feedback information to ensure appropriate routing of the call. More specifically, Bala does not disclose obtaining a feedback from a feedback warehouse containing information about previous interactions from a variety of sources, which can include scanned documents, surveys, data mining results, external automated feedback and internal automated feedback mechanisms, and/or dynamically altering values for the routing criteria based upon the feedback.

With regard to claims 8 and 26, the monitoring being referred to is the monitoring of call stress levels. The metrics being examined by Bala do not include customer metrics. With regard to claims 9, 15 and 27, Bala refers to standalone routing, not pre-call routing taking into account a feedback warehouse.

With regard to claim 16, Eilbacher does not take into account a feedback warehouse. Eilbacher and Bala do not provide pre-call routing support or a tool to support modification of the warehouse data.

It is, therefore, believed that none of the cited references, individually or in combination, discloses or suggests the present invention as claimed. Applicants thus respectfully request that the claims rejections under 35 U.S.C. § 103 be withdrawn.

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### **CONCLUSION**

Applicants believe that this application is now in full condition for allowance, which action is respectfully requested. Applicants request that the Examiner call the undersigned if clarification is needed on any matter within this Amendment, or if the Examiner believes a telephone interview would expedite the prosecution of the subject application to completion.

Respectfully submitted,

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